Global SILVER - JP Morgan and China Controlling Supply

helenaglass.net/2025/12/28/global-silver-jp-morgan-and-china-control-the-supply

Helena December 28, 2025

China contributes roughly 13% of the global mined silver, but 70% of the refining capacity. While DC Burned under Israel's hostage, Trump, China just outmaneuvered the global economy for technology, AI, defense weapons, EV's, iphones, computers, etc… China is shutting down the world's largest silver refinery. Beijing moving from strategic hoarding to total resource control.

They have introduced a new regime of export licenses designed to exclude every western trader. To get silver out of China beginning Jan 1, an entity must show production capacity of at least 80 tonnes, hold a 30 million dollar credit line and receive state approval over the rest of the world. China just pulled the rug from under US.

Samsung put in an order to COMEX for 50 million ounces to secure their contracts for 2026 and were given roughly 10% or 5 million, temporarily shutting down COMEX trading. Mexico is the largest producer of silver in the world with 5 major mines, 4 of which are owned by Industrias Penoles Sde CV and one by Newmont. YTD, Newmont's share price has risen from $40 to $106, an increase of about 270%. Penoles shares have risen from $290 to $980 YTD.

So where is all the Silver? JP Morgan has been revealed to have stockpiled 750 million ounces. A value today of $60 billion. In 2024, **global production** of silver was 819 million ounces. Global Reserves are estimated to be 640,000 metric tonnes – there are 35,274 ounces in 1 metric

tonne.

While Trump is pursuing penal bombing on countries without militaries, using up vital inventory, lying about the state of the US economy, and building ballrooms for the elite, the entire economy is going to crumble without rare earths and silver. A literal Firestorm! While Sunshine Silver in Idaho is upgrading and expanding, it only produces 7.6 million ounces annually. Under the new rules, companies must secure government licenses to export silver, with eligibility limited to state-approved firms producing at least 80 tonnes annually and holding $30 million in credit lines.

The US uses 1.2 billion ounces annually with Mexico and Canada the major export partners. The value increase will be passed to every electronic, every defense weapon every solar panel – etc… The cost of living is about to explode. Few can survive a 300% increase. Will inflation register these spikes or will artificial reporting continue to assert an inflation rate of 2% – a ridiculous gobsmack by President Trump whose economic genius is on par with a first grader.

The banks holding the largest short positions of silver include HSBC, Deutsche Bank, Bank of America, Scotia Bank and UBS. However a total of 22 banks hold shorts which could potentially lead to bank collapses. They are now sitting on 300% shorts and they are borrowing to cover the shorts. Like gold, the manipulation of silver is gone and the price is a market nightmare. Did Elon Musk also stockpile silver to secure Tesla?

China now holds the cards. And Trump's Big Beautiful Defense Destroyers and F-35's are grounded. Russia and the BRICS hold Title.

China, the Tortoise, is stockpiling cheap oil: *"As Trump hails himself as the King who brought down gas prices at the pump, he fails to acknowledge that oil prices are down from $75 a barrel to $57 YTD = – 24%. For most of the past decade, oil markets have treated decisions by OPEC as the primary signal for price direction. That hierarchy is being tested, but not overturned. What has changed is where traders look for short-term cues. Increasingly, those cues are coming from China, not because Beijing controls supply, but because its buying behavior now dominates marginal demand and near-term price discovery."*

While Saudi Arabia still controls the bulk of oil supply, Israel is bent on forcing Trump to take an adversarial approach to the country via refusing to sell weapons per contract. In other words, Israel is isolating America from trade and economic stability. Creating hostile environments, new enemies, and pariah stylized initiatives and sanctions. Trump seems willing… Noting that a new national guard force will be created to quell any potential future civil unrest as of April – invoking what appears to be a prediction.

As pre-tariff inventories are sold off, 2026 prices are scheduled to rise exponentially affecting everything from appliances to cars to clothing. And Trump will not be able to quell the social media reactions. However, the Israeli fueled Tik Tok deal is fast approaching its final stamp of approval projected to occur towards the end of January 2026. It is presumed that Israeli Zionists

have already created their PR campaign in the hopes of quelling the Truth. Too little too late, most young people have turned to Instagram leaving Israel with a hefty bill – $14 Billion. Not to worry, US Taxpayers will absorb it through lost Department of War receipts valued in the Trillions.

The US has no stockpile of silver. The question whether Fort Knox is empty remains unsolved. And rare earth minerals are the reason for invading other countries – the US has one mine recently reopened that will never fill the necessary void capacity. Instead, the US spends $1 trillion on weapons that can't be built without silver and rare earths. The logic is undeniably ignorant. But IF I were Satan, I would say, *'good job, this is how it is done'.*

While JP Morgan now has enough silver to power America for one year, China remains the largest refiner necessary for industrial use. But physical silver has now become a commodity blackmail with technology and AI the immediate hits followed by defense: ***Silver is used extensively in modern weaponry, particularly in guidance systems, batteries, and electronics for missiles, jets, and other defense tech, with some estimates suggesting hundreds of thousands, even millions of ounces annually for just hypersonic missiles.*** **For Russia – the trade becomes oil for silver. Israel and Amerisrael? Left in the dust.**